Teaching Checklists

Anyone can create a teaching checklist on a Symbiota web site. These can be used by students and field assistants needing to become familiar with a specific list of taxa. All checklists have access to the images in the image library, the flash card quiz tool, and the spelling tool.

1. Login and go to “My profile”
2. Under the “Species Checklists” tab, follow the instruction to “Click here to create a new checklist”.
3. Fill in the information requested. Boldfaced information is required; other fields are strongly recommended.
4. **Checklist name** should be recognizable by your students or field crew. Institution and course number can make a good combination. It is a good idea to include the year.
5. More inclusive reference list: If this checklist is a subset of another one, list the parent checklist here. This is more useful for research checklists than teaching checklists because it ensures that species added to an included checklist are also added to the parent checklist.
6. Delimiting the area, if appropriate. It would not be appropriate, for example, it the list is of common weeds. There are two ways to define the area. In the not very distant past, the only way to do so was to define a circle around the central point of the desired area. Latitude and longitude gave the location of the center, the point radius, the length of the circle’s radius in meter. The polygon tool is probably more useful. Clicking it brings up a map at the top center of which you can choose either to draw a circle or a polygon. Zoom in to the point where your whole area is shown but not a lot else. Then, to draw the polygon, simply click on each corner.
7. To understand the display options, view some existing teaching checklists and try alternative options. If this is your first attempt, accept the defaults. You can always change them later.
8. Private/Public. Initially make your checklist private. This gives you an opportunity to see how it looks. Again, this setting can be changed later.
9. Click “create checklist”.

The page that comes up will state “No taxa found”. At this point there are two alternatives, adding taxa individually or bulk upload. I recommend bulk upload. Clicking “Batch Upload Spreadsheet” brings up basic instructions but suggests that one can only include 4 columns. That is not correct; one can all seven columns available when adding names individually.

* **Sciname** should not include authors.
* **Family**: If you enter the family name here, you will override the system default. I advise against entering anything. The default family in OpenHerbarium is that recommended by the Angiosperm Phylogeny Group (APG). We all need to learn current thinking even if it is not what we ourselves learned in school.
* **Habitat**: If the species is usually found, *in your area*, near or in a path or under shrubs, you could add that information. You can also leave the field blank.
* **Abundance**: This is the location for terms like “common”, “frequent”, or “only one plant seen”. These terms should be used as appropriate *for the area covered by your checklist.* The field can be left blank.
* **Notes**: This is the place for comments such as “Cultivated ornamental”, “Grazed by camels”. The field can be left blank.
* **Internal notes**: This field, unlike the others, will be visible only to people authorized to edit the checklist. If it is a private checklist, that means only you. You might make a note “need to check the species” or “no picture available”.
* **Source**: This field is more likely to be used for research, rather than teaching, checklists. For such checklists, it is useful to know if the information came from a flora, some other publication, or a report by some individual. It can be left blank. One can also cite a specimen but the best way to do that is to use the voucher management tool. The checklist tools include one for finding species collected from within the area defined by the footprint polygon or circle.

# Batch uploading species

If you have several species to add at one time, it is easiest to add them via a csv (comma separated values) listing. The easiest way to create the desired listing is to use Microsoft Excel or OpenOffice Calc and then save the file as a csv file.

You must be very careful to spell the scientific names correctly. There are various sources that are generally considered reliable sources of names. It is best to search for the name you want on one of these sites. If you have entered it correctly, they will find the name. If you have an error in your spelling (it happens to all of us), you will be told that there is so much name in the database. At that point, check your spelling. Try entering the first part of it.

For animals, I usually go the Catalog of Life (<http://www.catalogueoflife.org/col/>) first. For vascular plants, there are two good sources: the International Plant Names Index (IPNI; <http://www.ipni.org>) and TROPICOS (<http://www.tropicos.org>), the nomenclatural database of the Missouri Botanical Garden. For fungi, Index fungorum (<http://www.indexfungorum.org/>) is the best source.

## The spreadsheet

One field in the spreadsheet MUST be called “sciname”. It is mandatory. The other fields that you can, but do not have to, include, are “family”, “habitat”, “abundance” and “notes”. For an explanation of what these terms means, see the boldfaced terms in the previous section. As noted there, I strongly recommend that you NOT enter the family name. See the sample table below for an upload format with one correctly spelled sciname and one incorrectly spelled name.

|  |  |  |  |
| --- | --- | --- | --- |
| Sciname | Habitat | Abundance | Notes |
| [***Asystasia gangetica***](http://openherbarium.org/taxa/index.php?taxauthid=1&taxon=241355&cl=6) | Middle of the field | Rare | Demonstration; correct spelling |
| [***Asystasia gangetca***](http://openherbarium.org/taxa/index.php?taxauthid=1&taxon=241355&cl=6) | Middle of the field | Unknown | Demonstration; wrong spelling |

The figure below shows the results of uploading this file.



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ote that only one name, the one that was correctly spelled, was uploaded.

Clicking “Return to checklist” will bring up the page shown below:



Note: There are no images of *Asystasia gangetica* in the IntermountainBiota

# Going public

In the figure above (showing the 2018 Tiny Sample Checklist), notice that there are three pencils to the top right. As always on Symbiota web sites, they link to editing tools. The “A” pencil links to the administration page, the “V” pencil to the voucher management page, and the “Spp” pencil enables adding or removing species from the checklist.

To make a checklist public, click the “A” pencil to reach the Administration pages. There are three tabs – Admin, Description, and Related Checklists. The Admin tab allows you to add or delete editors. The Description page has, at the bottom, the button to click to change the checklist from private to public. This is the first step. Now close the checklist and THIS IS WHERE I HAVE TO ASK ED FOR HELP. I am pretty sure you have to ask me to do one more thing but I cannot recall what that thing is.